

Date/Time Stamp:

Employee Post-Travel Disclosure of Travel Expenses

Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS

2022 MAY -2 PM 2:20

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

The University of Chicago Institute of Politics

Private Sponsor(s) (list all): _____

Travel date(s): April 14-15, 2022

Name of accompanying family member (if any): n/a

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses (Amount & Description) |
|---|-------------------------|------------------|---------------|---------------------------------------|
| <input type="checkbox"/> Good Faith Estimate | \$437.92 | \$268.85 | \$0 | \$0 |
| <input checked="" type="checkbox"/> Actual Amount | | | | |

Expenses for Accompanying Spouse or Dependent Child (if applicable):

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses (Amount & Description) |
|--|-------------------------|------------------|---------------|---------------------------------------|
| <input type="checkbox"/> Good Faith Estimate | | | | |
| <input type="checkbox"/> Actual Amount | | | | |

Provide a description of all meetings and events attended. *See Senate Rule 35.2(c)(6).* (Attach additional pages if necessary.): Career panel discussion with Institute of Politics students as well as moderated discussion

about the Infrastructure Investment and Jobs Act.

4/28/2022
(Date)

Avery Pierson
(Printed name of traveler)

Avery Pierson
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

5/2/2022
(Date)

Rob Pantano

(Signature of Supervising Senator/Officer)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

-
1. Sponsor(s) of the trip (please list all sponsors): The University of Chicago Institute of Politics
 2. Description of the trip: Trip to University of Chicago to participate in discussion hosted by the non-partisan Institute of Politics (IOP)
 3. Dates of travel: April 14-15, 2022
 4. Place of travel: Chicago, IL
 5. Name and title of Senate invitees: Avery Pierson, Legislative Assistant
 6. I *certify* that the trip fits one of the following categories:
☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
- OR -
☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
 7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- AND -
☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
 8. I *certify* that:
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
- AND -
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

- OR -

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The IOP is convening and financially responsible for the program. The program is free and open to current UChicago students, faculty, and staff.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

The nonpartisan Institute of Politics is committed to fostering in our students a passion for public service, meaningful dialogue, and active engagement in our democracy. This program will help our students better understand the processes in which our federal government enacts change.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

Previously we've hosted current members of Congress to speak to our students.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Four core programs form the heart of the Institute: civic engagement opportunities that enable students to experience politics-in-action; visiting fellowships; paid public service internships; and a series of public events featuring leading political figures sharing their insights on key issues of the day.

16. Total Expenses for Each Participant:

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses |
|--|---------------------------|------------------|---------------|----------------|
| <input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts | \$300 air \$250 ground | \$225 | \$0 | \$0 |

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

Given the nature of the discussion, this program was arranged specifically with congressional participation in mind.

18. Reason for selecting the location of the event or trip

The University of Chicago is in the Hyde Park neighborhood of Chicago.

19. Name and location of hotel or other lodging facility:

Either the Sophy Hyde Park or London House - dependent on which airport Ms. Pierson uses.

20. Reason(s) for selecting hotel or other lodging facility:

Ease of travel to airport - either ORD or MDW

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:
The federal per diem for lodging in Chicago during April is \$216 - the \$225 listed is inclusive of taxes.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:
Economy

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).
24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:
None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):
Signature of Travel Sponsor: Christine Hurley
Name and Title: Christine Hurley, Director of Production and Special Events
Name of Organization: The University of Chicago Institute of Politics
Address: 5707 S. Woodlawn Ave., Chicago, IL
Telephone Number: (773) 834-3481
Fax Number: _____
E-mail Address: cehurley@uchicago.edu



How the Sausage Gets Made: Bipartisan Infrastructure Investment and Jobs Act
Thursday, April 14, 2022 5:30PM-6:30PM
Institute of Politics
5707 S. Woodlawn Ave., Chicago, IL

About the Institute of Politics (IOP)

Four core programs form the heart of the Institute: civic engagement opportunities that enable students to experience politics-in-action through political exploration trips, leadership training, service programs and voter engagement projects; visiting fellowships where distinguished political officials, policymakers, journalists, diplomats and others are in residence on campus during an academic quarter; political and public service internships that provide students with paid, substantive career development opportunities; and a continuous series of public events featuring leading political figures sharing their insights on key issues of the day.

Description

How does a half-trillion dollar piece of legislation get passed in one of the most deadlocked congresses of all time? We didn't know, so we figured we would ask the people who got it done. Join the IOP's [Student Advisory Board](#) as we hear from a panel of Senate and House staffers who did the on-the-ground wheeling and dealing (no pun intended) to pass the Bipartisan Infrastructure Investment and Jobs Act.

Event Overview

| | |
|---------------|--|
| Audience: | UChicago students, faculty, & staff |
| Format: | Moderated conversation followed by audience Q&A |
| Media: | On the record |
| Tickets: | Free (attendees must register) |
| IOP Contacts: | Joel Ebert, Director, Speaker Series—630.205.0747 Christine Hurley, Director, Production—708.837.8784 |

Timeline

| | |
|-----------|--|
| 5:00PM CT | Guests arrive to Institute of Politics - greeted by IOP staff |
| 5:20PM CT | Program runthrough by Sophie Hare, AB '23 (member of IOP's Student Advisory Board) |
| 5:30PM CT | Welcome by IOP Andrew Simon, AB '22 (member of IOP's Student Advisory Board) |
| 5:33PM CT | Begin moderated discussion |
| 5:05PM CT | Begin audience Q&A |
| 5:27PM CT | Final audience question |
| 5:30PM CT | Program concludes |

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Date/Time Stamp:

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Avery PiersonEmploying Office/Committee: Senator Rob PortmanPrivate Sponsor(s) (list all): The University of Chicago Institute of PoliticsTravel date(s): April 14-15, 2022*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*Destination(s): Chicago, IL

Explain how this trip is specifically connected to the traveler's official or representational duties:

The Institute of Politics is hosting a panel discussion with staffers of the Senators who negotiated the bipartisan infrastructure framework and wrote the subsequent Infrastructure Investment and Jobs Act. As the Legislative Assistant covering infrastructure for Senator Portman, who was the lead Republican in these negotiations, UChicago has asked for my participation.

Name of accompanying family member (if any): n/aRelationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

2/25/2022
(Date)Avery Pierson
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Senator Rob Portman hereby authorize Avery Pierson
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

2/25/22
(Date)Rob Portman
(Signature of Supervising Senator/Officer)

Best,
Andy

From: Sophie Hare <share@uchicago.edu>
Sent: Thursday, January 20, 2022 6:17 PM
To: Joel Ebert <jebert@uchicago.edu>; Youngen, Angie (Portman) <Angie_Youngen@portman.senate.gov>
Cc: Andrew Simon <awsimon@uchicago.edu>
Subject: Re: Another UChicago IOP invitation

Hello Ms. Youngen,

I hope you are doing well. My name is Sophie Hare. I am a junior and a member of the Institute of Politics' Student Advisory Board.

As Joel mentioned, our Board is planning to host an event highlighting the bipartisan effort to pass the Infrastructure Investment and Jobs Act. As Senator Portman was such a consequential negotiator of the Act's passage, we believe that a member of the Senator's staff will be excellently positioned to provide insight into the legislative maneuvering required to get the bill on the President's desk.

We hope to explore the extent to which Democratic and Republican staff members worked together to draft/revise the bill, the gamesmanship of intra- and inter-party whipping, the role of pork politics, and the influence of the White House. Additionally, how do policymaking and bipartisanship differ between the House and Senate, and how do parties balance strategy with sound policy? We believe a conversation addressing such questions will be illuminating and helpful for students who aspire to one day pass consequential legislation themselves.

Our suggested format for the event would be a moderated 45-minute conversation between a staffer from Senator Portman's office and a staffer from Representative Clyburn's office followed by a 30-minute question-and-answer session. The audience will consist exclusively of University of Chicago students, faculty, and staff. Our suggested date would be February 21st, when Congress is out of session, but we are happy to work with your office to find a date of mutual convenience. We would of course coordinate all travel expenses.

Our plan is to invite a Congressional reporter to facilitate the conversation.

We hope a member of the Senator's staff is interested in participating! Please feel free to reach out with any further questions.

Regards,

Sophie
